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Application Notes: MaxACD Connector For Salesforce

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These application notes are provided for administrators who are configuring AltiGen Communication's MaxACD Connector to work with Salesforce.com. The instructions cover:

- Administrator configuration
- Installation on the client system
- Basic use of the connector
- Connector settings

Introduction

Salesforce.com provides a CTI toolkit to integrate its accounts with telephony systems, with which a SoftPhone is created in a web browser for agent call control.

AltiGen encapsulates the CTI toolkit into a MaxACD Connector, to integrate an AltiGen IP PBX system with Saleforce.com. This document describes how to configure this connector.

Refer to https:/na9.salesforce.com/help/doc/en/cti_admin_deployadapter.htm for more details on deploying a CTI adapter. Refer to https:/na9.salesforce.com/help/doc/en/cti_using.htm for details on how to use a SoftPhone.

Requirements

The MaxACD server must meet the following minimum requirements:

- MaxACD release 6.5.8 must be running on a server that is accessible to the clients
- MaxACD must have one AltiGen CRM Integration Seat License for each agent who will be using the MaxACD Connector for Salesforce.com

The client system must meet the following minimum hardware requirements:

- 2GHz CPU or faster
- 1GB available hard drive disk space
- 1GB RAM
- SVGA monitor (1024 x 768) with 256 color display (or better)

The client system must meet the following software requirements:

- The client must be running Microsoft Lync 2010 or Lync 2013
- The client must be running Windows XP SP3 or later, Windows 2008, Windows 7, or Windows 8
- The client system must have Microsoft .NET 3.5 or higher framework
- The client system must have one of the following browsers: Internet Explorer 8.0 or later, Firefox 3.5 or later, Safari 4.0 or later, or Chrome 10.0 or later
- The organization must be running either the Enterprise or the Professional edition of Salesforce, with privileges to run CTI Toolkit
- An AltiGen CRM Integration Seat license must be installed on the MaxACD server

Installing the MaxACD Salesforce Connector

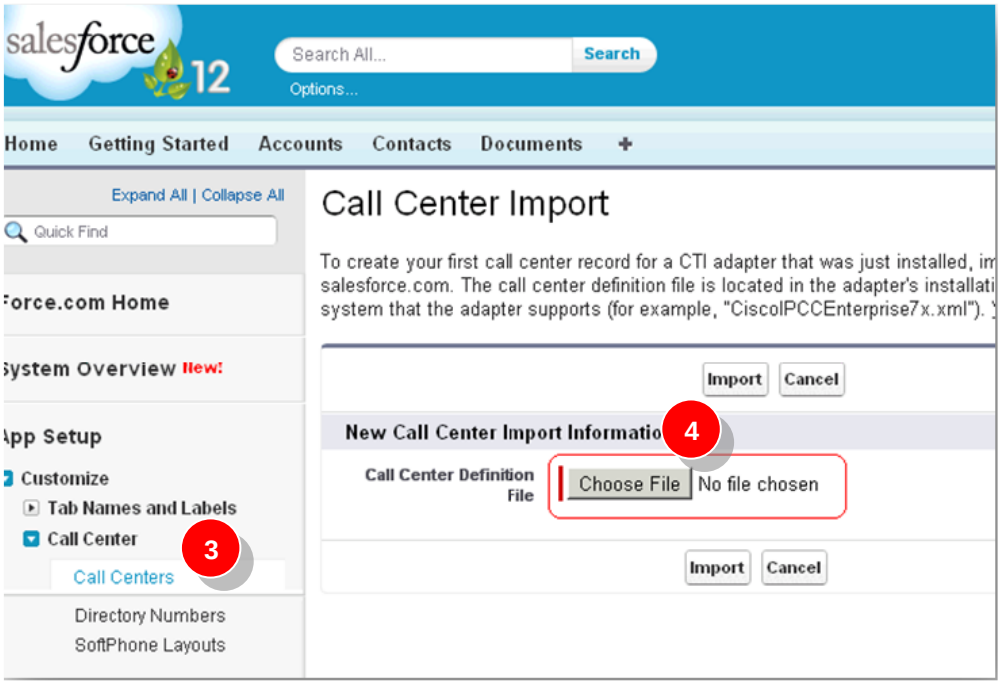
This section describes how administrators import the connector XML file and add users to the connector.

Step 1: Import the Call Center File into Salesforce

Make sure you have Manager account privileges in Salesforce.com.

To configure your enterprise's Salesforce account to work with the MaxACD Connector,

1. Log onto your Salesforce administrator account.
2. In Salesforce.com, click **Setup**.
3. Under **App Setup** (left column), click **Customize** > **Call Center** > **Call Centers**.
4. Click **Import**, and then click **Choose File**.



5. Insert the MaxACD 6.5.8 Client DVD into the DVD drive.
6. Navigate to this folder on the DVD:

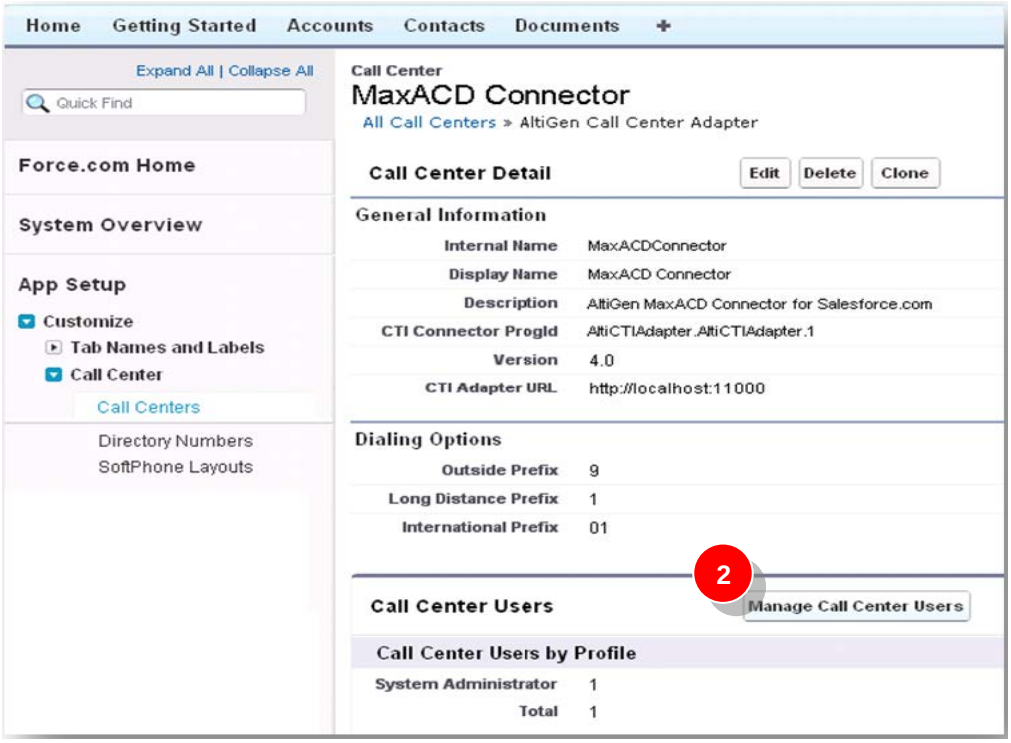
   `\MaxACD Connector for Salesforce\Call Center XML`
7. In that folder, select the file **MaxACDConnector.xml**. Click **Import**.

   The MaxACD Connector should now appear in the call center list.

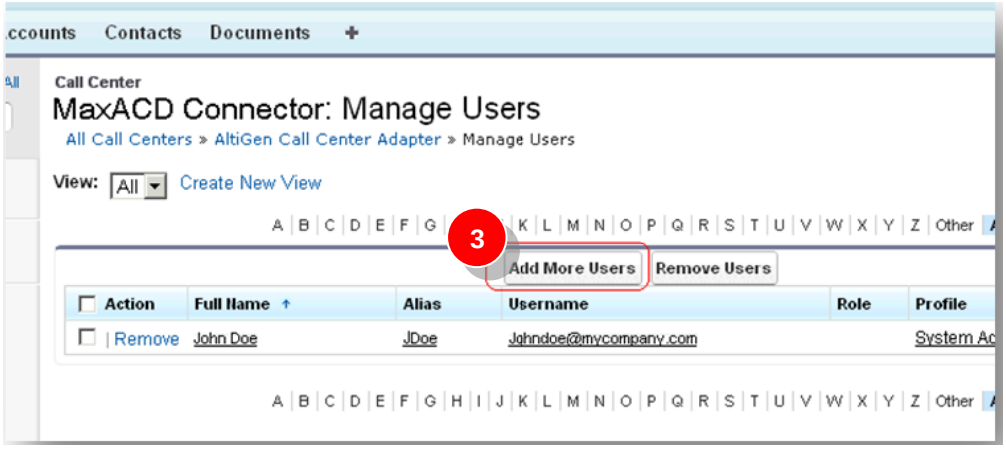
Step 2: Add Users to the Connector

Next, add the users who will be allowed to use this MaxACD Connector.

1. In the Call Center list, click **MaxACD Connector**. Details of the call center appear.
2. Near the bottom, click **Manage Call Center Users**.



3. On the Manage Users page, click **Add More Users**.


ccounts
Contacts
Documents
Call Center
MaxACD Connector: Manage Users
All Call Centers » AltiGen Call Center Adapter » Manage Users
View: All
Create New View
A B C D E F G K L M N O P Q R S T U V W X Y Z Other
3
Add More Users
Remove Users
Action
Full Name
Alias
Username
Role
Profile
Remove
John Doe
JDoe
Johndoe@mycompany.com
System Ac
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other

4. To search for a user, enter your search criteria in the *Search for New Users* page. Click **Find**.

5. In the search results, select the desired user and click **Add To Call Center**. That user can now use the MaxACD Connector.

Step 3: Assign a SoftPhone Layout to Users

Be sure each user is assigned a SoftPhone layout. You can do this in the **Customize** > **Call Center** > **SoftPhone Layouts** page.

unts
Contacts
Documents
SoftPhone Layouts
A SoftPhone is a customizable call control tool that appears in the sidebar of every salesforce.com page if a user is a
and is working on a machine on which a CTI adapter has been installed. Similar to page layouts, you can design cust
and assign them to call center users based on their user profile.
New
SoftPhone Layout Assignment
Action
Name
Default
Created By Alias
Created Date
Last Modified By Alias
Edit
Standard SoftPhone Layout
JDoe
5/14/2012 3:41 PM
JDoe

Step 4: Configure MaxAdministrator

You must have one CRM Integration seat license for each agent who will be running the MaxACD Connector.

MaxACD Connector will receive caller ID and IVR data, and will call the Salesforce.com API to match a record in the customer database.

- Caller ID is from the Central Office (CO)
- IVR data is configured in the MaxAdministrator Auto Attendant (AA) panels

You must set up an AA entry, configuring it to collect digits based upon a value tag and the length of the digits.

AA Configuration Example

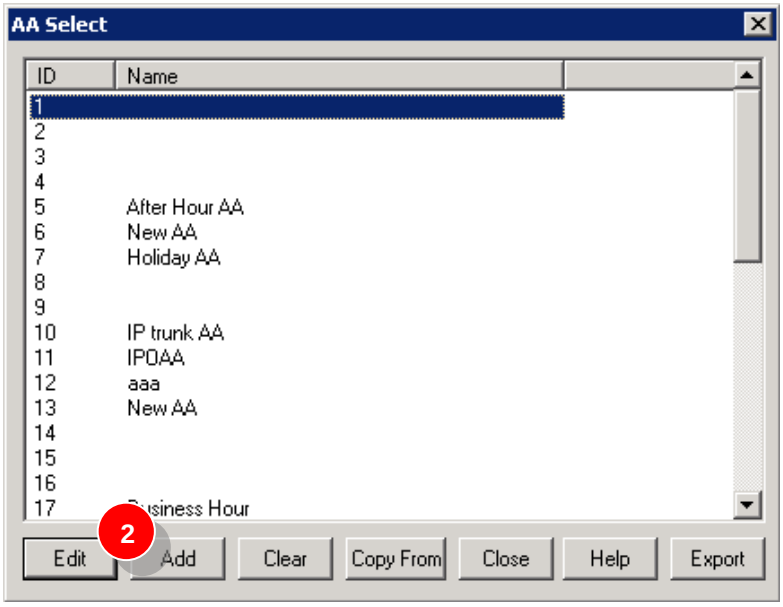
For example, Salesforce has a page for cases; each case has an 8-digit case number prefixed with zeroes. The field name of a case number is ***Case.CaseNumber***.

In this case, you could configure an AA entry with the tag set to ***Case.CaseNumber*** and the digit length set at 4 – 8.

If a user entered 1234 at this menu, The MaxACD Connector would receive IVR data “Case.CaseNumber =1234”. The next figure shows how you would configure this AA entry.

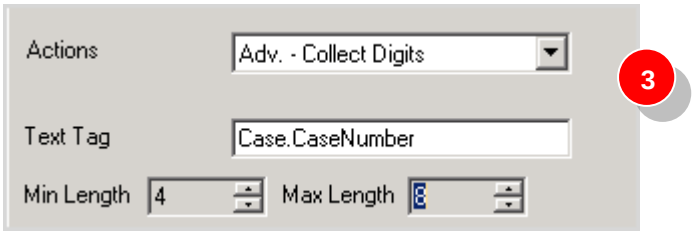
Follow these steps to configure MaxAdministrator:

1. In MaxAdministrator, choose **System** > **AA Configuration**.
2. In the list, select an AA to update, and then click **Edit**.



3. Configure the AA entry as follows, and then click **OK**.

- Set **Actions** to *Adv. – Collect Digits*
- Set **Text Tag** to *Case.CaseNumber*
- Set **Min Length** to *4*
- Set **Max Length** to *8*



Installing the MaxACD Connector on Client Systems

You must install the connector on the system of each user who will be using the MaxACD Connector.

1. Insert the MaxACD 6.5.8 Client DVD into the DVD drive of the client system.
2. Navigate to this folder on the DVD:

   `\MaxACD Connector for Salesforce\Setup`
3. In that folder, run **Setup.exe**.

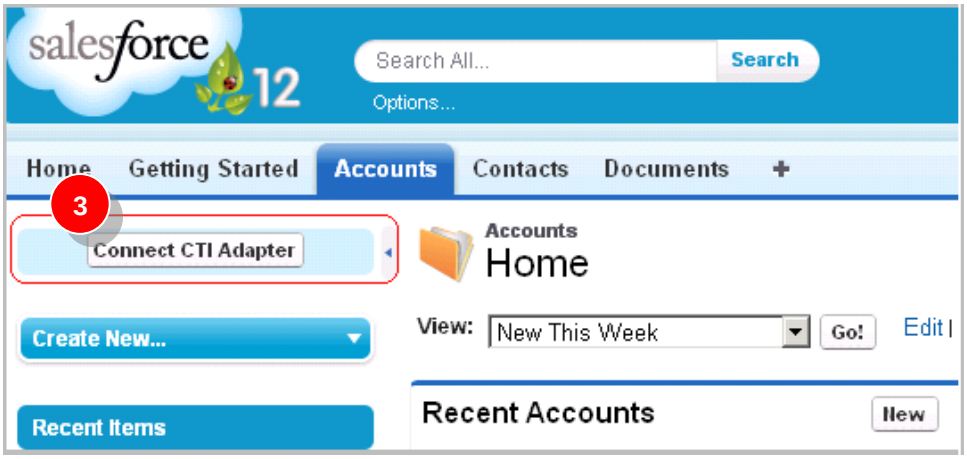
The next time the client system is rebooted, the MaxACD Connector will automatically start as part of the Startup services. Until you reboot, you can run the MaxACD Connector from Windows: Click **Start** > **All Programs** > **MaxACD Connector for Salesforce** > **MaxACD Connector**.

Running the MaxACD Connector on Client Systems

To run the MaxACD Connector,

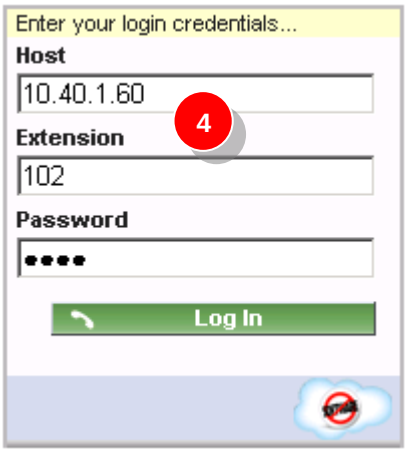
1. If the MaxACD Connector has already been started, you will see an icon in the Windows tray area. If you do not see this icon, you can run the connector manually: Click **Start** > **All Programs** > **MaxACD Connector for Salesforce** > **MaxACD Connector**.
2. Log into your Salesforce.com account.

   The SoftPhone should appear at left-top corner while you are viewing the *Contacts*, *Leads*, *Activities*, or *Accounts* pages. Initially, it appears as a **Connect CTI Adapter** button, as shown in the next figure.
3. Click **Connect CTI Adapter**. The login panel opens.

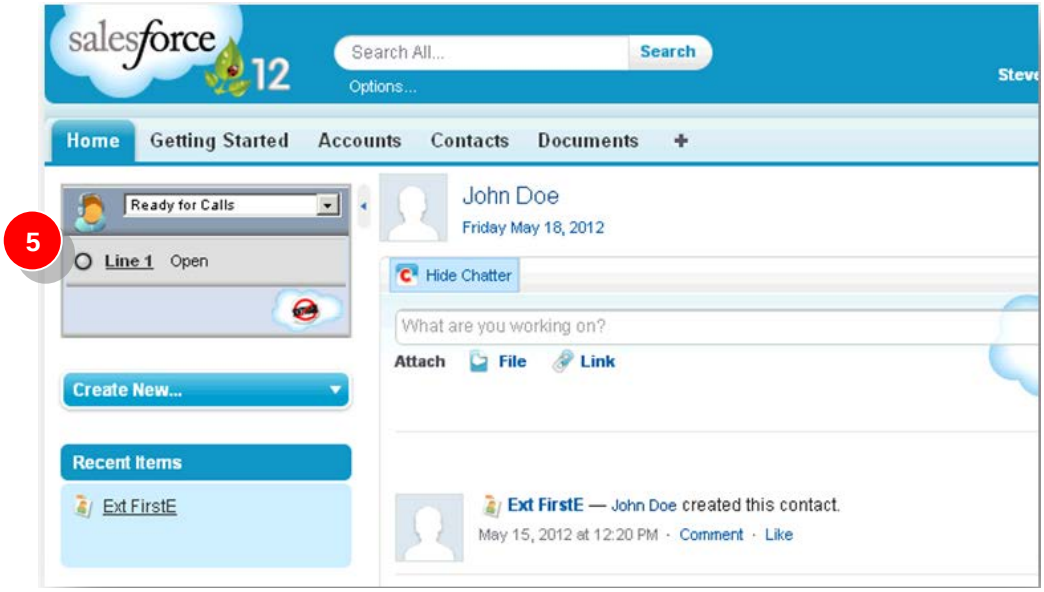


4. Enter your login information and click **Log In**.

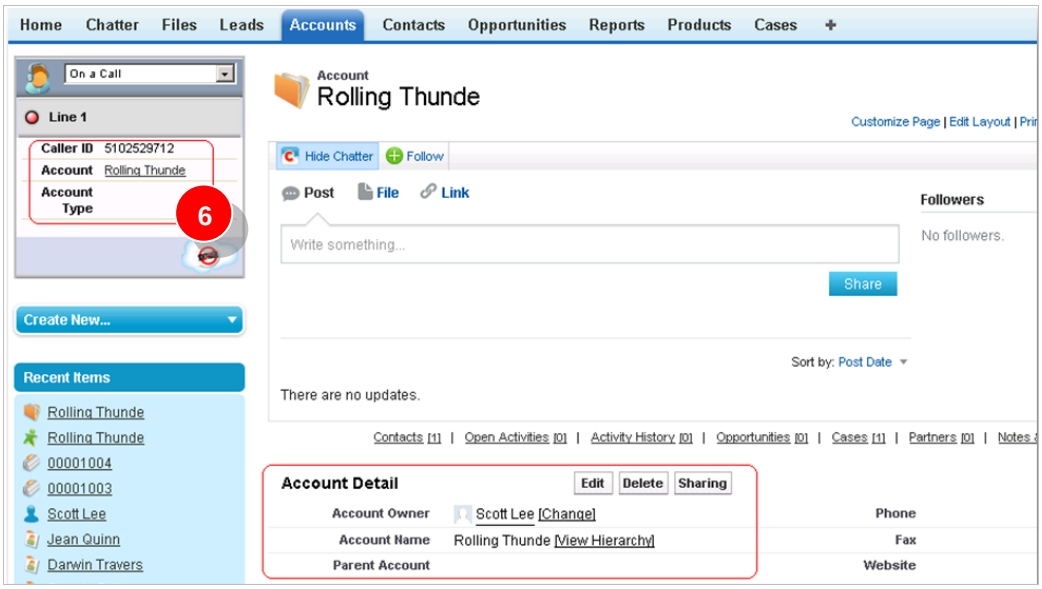
   For the Host field, enter either the MaxACD Server IP address or the Fully Qualified Domain Name (FQDN); contact your administrator for this information. If MaxACD was configured with redundancy, the FQDN may be the preferred login method.



5. Once the MaxACD Connector connects with the MaxACD server, the small left panel should say “Ready for Calls” as the status.



6. When a call comes in for you, the MaxACD Connector receives the Caller ID and/or the IVR data. Depending upon how you configured the MaxACD Connector options, the Salesforce page opens with the retrieved data.



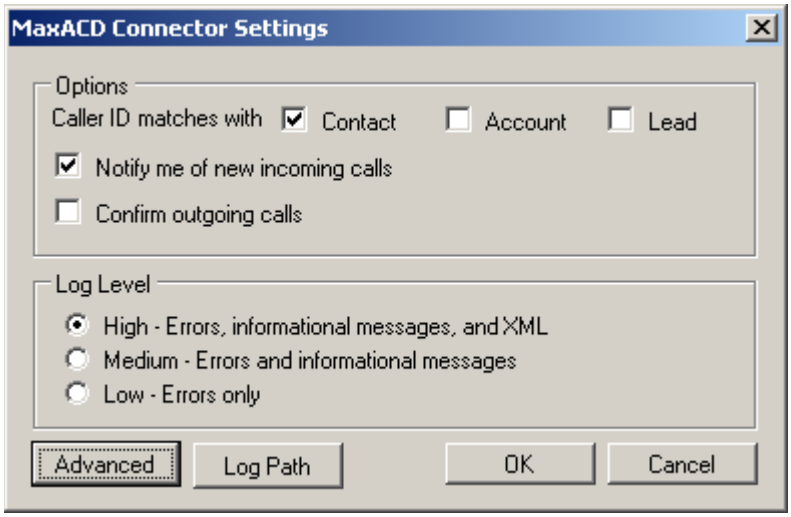
If no data can be matched to the data from the call, the panel will show a message that no results were found for the call.

Configuring MaxACD Connector Settings

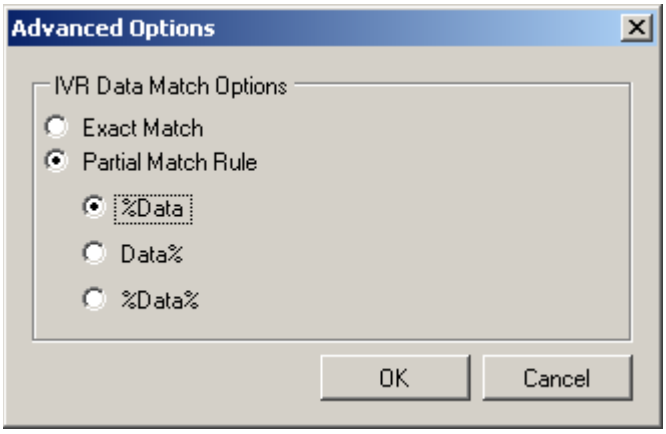
While the MaxACD Connector is running, an icon appears in the Windows tray area. Right-click the icon to open a menu.

- **Settings** – Opens the Settings window
- **About** – Shows information about the MaxACD Connector
- **Exit** – Closes the MaxACD Connector

When you choose **Settings** from the menu, a window offers various options.



- **Caller ID matches** – Select which type of data you want to match against incoming calls; contact, account, and/or lead.
- **Notify me of new incoming calls** – Shows a pop-up window when a call comes in, letting you choose whether to open Salesforce.com. If you clear this setting, incoming calls will automatically open Salesforce.
- **Confirm outgoing calls** – Shows a confirmation message when you click a phone number in Salesforce to make a call.
- **Log Level** – Specify what type of data will be logged. The default level is **Low**.
  - » **High** – Logs errors, informational messages, and XML
  - » **Medium** – Logs only errors and informational messages
  - » **Low** – Logs only errors
- **Advanced** – Offers advanced query options. These options apply to string value queries only; they do not work for number values.
  - » **Exact match** – Match string values exactly
  - » **%Data** – Match strings from the right
  - » **Data%** – Match strings from the left
  - » **%Data%** – Match strings in the middle

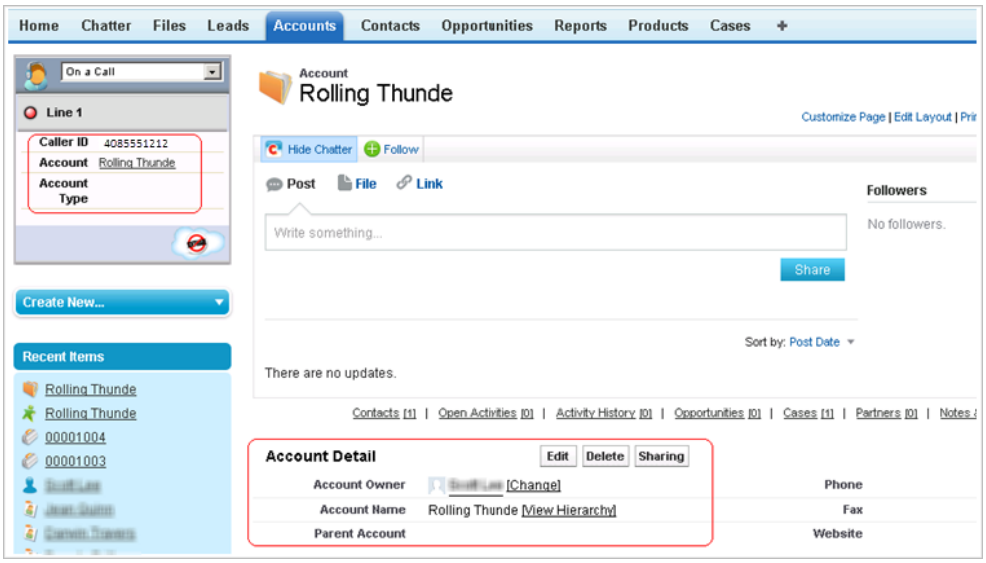


- **Log Path** – Shows the directory path to the log file.

Note: The security settings for your browser may block non-secured content, which could prevent the pop-up from being displayed. It may be necessary to adjust your browser's security settings to display these pop-ups.

Testing the MaxACD Connector

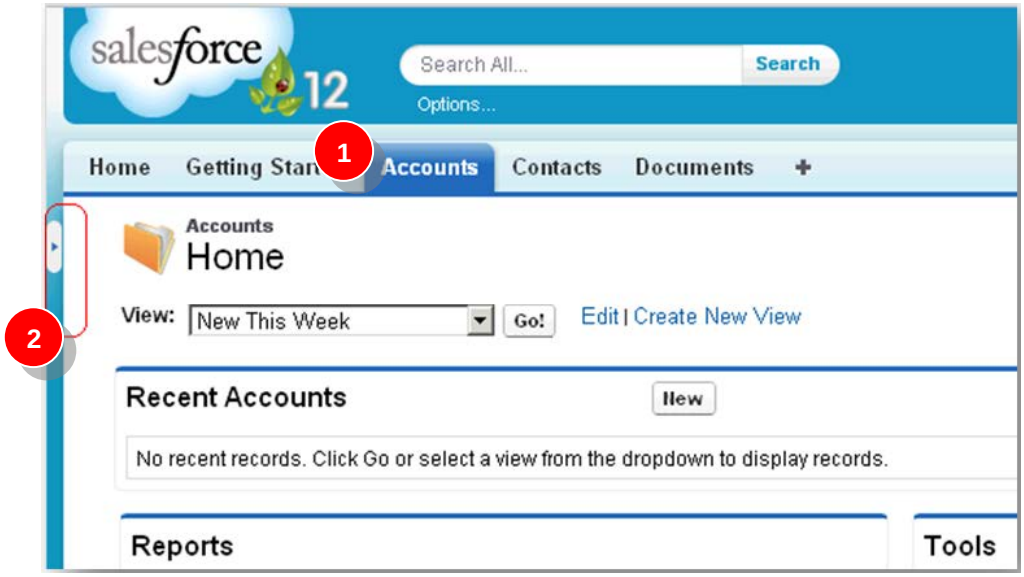
To test that MaxACD Connector is working properly, place calls to the extension. You should see the call alert in the panel, with the Caller ID. If the Caller ID matches a contact in the Directory, the contact information will appear in the panel.



Troubleshooting

If the MaxACD Connector panel does not appear, follow these steps:

1. Within Salesforce.com, click either **Accounts** or **Contacts** to open one of those pages.
2. If you still do not see the MaxACD Connector panel, check whether the left panel has been hidden. If this is the case, a small arrow appears on the left side, as shown in the next figure. Click the arrow to expand the panel.



Security warning

While browsing in Internet Explorer, you may sometimes see “Do you want to view only the webpage content that was delivered securely?” To disable this message so that it does not reappear, follow these steps (these steps may vary from one version of the browser to another):

1. In Internet Explorer, click **Tools** > **Internet Options** > **Security.**
2. Click the **Security** tab.
3. Click on the *Internet zone* icon at the top of the tab page.
4. Click **Custom Level**.
5. In the **Miscellaneous** section, change *Display mixed content* to **Enable**.
6. Repeat these steps for the *Local intranet, Trusted sites,* and *Restricted sites* zones.